

## Congratulations on having obtained external funding!

As the project's Principal Investigator you are the main responsible for the project, i.e. for executing and managing the project. This document is meant to help you identify where to get support and how to share information throughout the project's start and life cycle. See the final page for an overview on who does what.

- **Project setup**

You have received a confirmation and starting documents from the funder and have shared the good news within your department.

Please forward the documents to the Faculty project coordinator and project control.

### Project control

- Checks for any budgetary changes that may result from the decision of the grant institution;
- Provides any necessary financial information for the start documents;
- Takes the necessary internal steps so that the project can be correctly administered throughout its life cycle.

The **Faculty project coordinator** supports you in finalizing the start documents by

- Having a legal check done on contracts or other legal documents;
- Getting documents signed by the authorized mandate holder.

### You

- Submit the final documents to the funder in the form required;
- Please send the completed documents to the Faculty project coordinator and to project control for filing.

Once **the project has started**, the following issues may arise:

- **Personnel on project**

In case you have planned for new personnel on the project, start the hiring process timely in consultation with your department's operational manager. The operational manager knows which steps are necessary to get a vacancy approved and published online.

The operational manager will also book the correct hours of all project members, incl. yours, on the project budget code (WBS-element). Check with them when the project starts – and when changes occur throughout the project – to make sure the bookings are according to the approved project plans.

- **Time writing**

In case your funder requires time writing on the project, your project controller will give you access to the system (TSM) and instruct you and any possible project members on how to go about this.

As the PI you are responsible for signing off the time sheets of the other project members.

*Please make sure that the time sheets are filled and signed off every month.* Time sheets are part of the accountant's check on a project, and if they are filled and signed off too late, you risk that the hours are declared non-eligible and that we do not receive the complete project sum.

- **Approving of cost claims by project members and invoices from suppliers**

As you are the PI on the project, cost claims by the other project members and invoices from suppliers, both for amounts up to EUR 5,000, will be submitted to you for approval in the Self-Service tool.\* Make sure to heed system alerts that a task is waiting for you.

Before they are passed on to you, the invoices and declarations have already been checked by your project controller for eligibility and for compliance with the project budget.

- **Internal analyses for signing**

At regular intervals throughout the project, your project controller will provide you with an overview on what has been spent on the project so far and which spending room is still available. Take heed of the issues that have been identified, *sign the analysis* and return it to the project controller.

The analysis contains:

- The external budget as submitted to the financing institution
- The internal budget which includes all additional costs (e.g. overhead) that are incurred on top of the eligible costs
- The income and expenses that have been realized so far
- Any issues identified by the project controller that warrant your attention

- **Project changes**

Throughout a project's life cycle different circumstances might lead to a change of plans, e.g. underspending in one category and the need for more spending in another, long-term sick leave of project members, team members starting late or leaving early, etc. Make sure to involve

- Project control for information on whether budgetary changes are possible, for calculating them and for information on how to submit them to the funder for approval;
- The Faculty project coordinator for assistance with changes to contracts and agreements;
- Keep your operational manager in the loop for additional hiring or for changes to hour bookings on your project resulting from *approved* project changes.

- **Interim and final reports to the grant institution**

While you need to provide the content part of interim and final reports, your project controller provides the financial figures. Where and as soon as available, send them the format in which the grant institutions wants to receive the report. Where needed, the Faculty project coordinator will take care of the necessary signatures.

- **End of project**

Once you have sent the final report, you have successfully completed the project. There is one more thing left to do: Please forward the email or the letter by which the financing institution accepts the final report to your project controller. The project controller can then formally and administratively close the project.

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\* Your *own* cost claims for under EUR 5,000 and all costs claims and invoices from EUR 5,000 upwards are automatically routed to the head of the department. All cost claims and invoices from 25.000 upwards are routed to the Faculty managing director.

### **Faculty project coordinator**

- Link to data management/ privacy/ethics review/
- Legal checks
- Support for submission of project changes to grant institution
- Official signatures on legal documents/amendments/interim/ final reports

### **Project control**

- Check on original budget
- Calculations of/advice on budget changes
- Interim analyses
- Interim and final reports
- Invoicing to financing institution
- Accountant's report
- Filing of project documents
- Check on cost claims/invoices/hour bookings on project budget code (WBS-element) in Self-Service tool

### **Principal Investigator**

- Content
- Project management
- Time writing and sign-off of time sheets
- Approval of cost claims/invoices < € 5000

### **Department operational manager**

- Questions on own contribution
- Hiring of personnel
- Booking of hours on project budget code
- Consequences for teaching hours